

A BETTER WORDPRESS FOR CLIENTS

*Save time and provide a professional hand over
to your clients*

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Objective

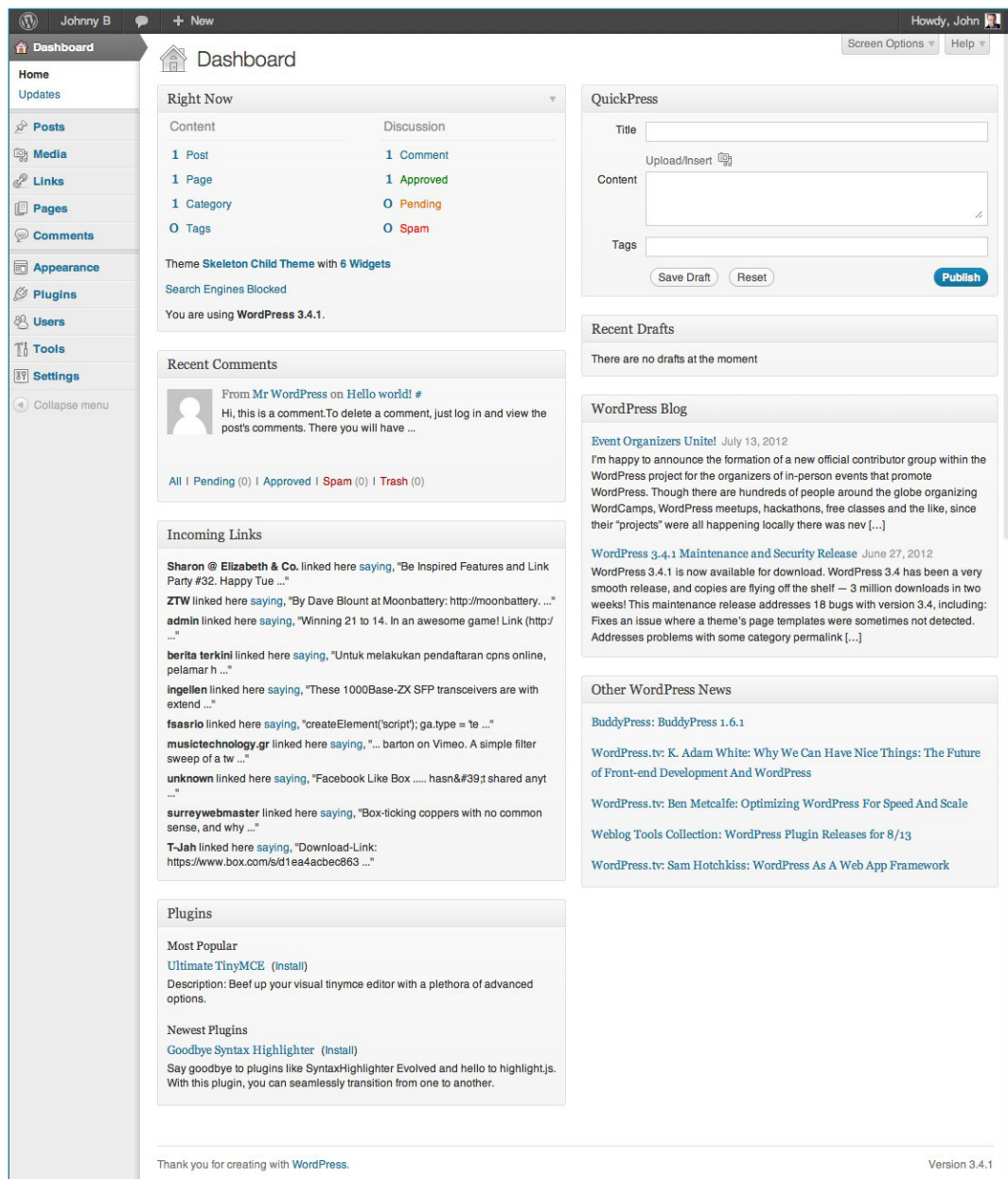
Work with people you like, on projects you enjoy and get paid what you're worth. Life is too short to do otherwise.

I paraphrased [Dan Kennedy](#) for that quote. It has become my motto. One way to get there is to “wow” your clients and make their life easy instead of being a pain the ass and a disappointment.

If you're building websites for clients using WordPress then you're already doing a pretty good job of “wowing” them I'll bet.

Let's go one, or quite a few, steps further.

Let's go from this:



The screenshot displays the WordPress 3.4.1 Dashboard interface. At the top, the user 'Johnny B' is logged in, and the dashboard title 'Dashboard' is visible. The left sidebar contains a menu with links to Home, Updates, Posts, Media, Links, Pages, Comments, Appearance, Plugins, Users, Tools, and Settings. The main content area is divided into several sections: 'Right Now' showing 1 Post, 1 Page, 1 Category, 0 Tags, 1 Comment, 1 Approved, 0 Pending, and 0 Spam; 'Theme Skeleton Child Theme with 6 Widgets'; 'Search Engines Blocked'; 'You are using WordPress 3.4.1.'; 'Recent Comments' showing a comment from 'Mr WordPress'; 'Incoming Links' listing various links; 'Plugins' showing 'Ultimate TinyMCE' and 'Goodbye Syntax Highlighter'; 'QuickPress' for creating new posts; 'Recent Drafts' showing no drafts; 'WordPress Blog' with news about Event Organizers and WordPress 3.4.1; and 'Other WordPress News' with links to BuddyPress, WordPress.tv, and Weblog Tools Collection. The footer includes a thank you message and the version number 3.4.1.

Johnny B + New Howdy, John

Dashboard

Home Updates

Posts Media Links Pages Comments Appearance Plugins Users Tools Settings

Collapse menu

Dashboard

Right Now

Content	Discussion
1 Post	1 Comment
1 Page	1 Approved
1 Category	0 Pending
0 Tags	0 Spam

Theme Skeleton Child Theme with 6 Widgets

Search Engines Blocked

You are using WordPress 3.4.1.

Recent Comments

From Mr WordPress on Hello world! #
Hi, this is a comment. To delete a comment, just log in and view the post's comments. There you will have ...

All | Pending (0) | Approved | Spam (0) | Trash (0)

Incoming Links

Sharon @ Elizabeth & Co. linked here saying, "Be Inspired Features and Link Party #32. Happy Tue ..."

ZTW linked here saying, "By Dave Blount at Moonbattery: http://moonbattery. ..."

admin linked here saying, "Winning 21 to 14. In an awesome game! Link (http:/ ..."

berita terkini linked here saying, "Untuk melakukan pendaftaran cpns online, pelamar h ..."

ingellen linked here saying, "These 1000Base-ZX SFP transceivers are with extend ..."

fsasrio linked here saying, "createElement('script'); ga.type = 'te ..."

musictechnology.gr linked here saying, "... barton on Vimeo. A simple filter sweep of a tw ..."

unknown linked here saying, "Facebook Like Box hash't shared anyt ..."

surreywebmaster linked here saying, "Box-ticking coppers with no common sense, and why ..."

T-Jah linked here saying, "Download-Link: https://www.box.com/s/d1ea4acbec863 ..."

Plugins

Most Popular

Ultimate TinyMCE (Install)

Description: Beef up your visual tinymce editor with a plethora of advanced options.

Newest Plugins

Goodbye Syntax Highlighter (Install)

Say goodbye to plugins like SyntaxHighlighter Evolved and hello to highlight.js. With this plugin, you can seamlessly transition from one to another.

QuickPress

Title

Content

Tags

Save Draft Reset Publish

Recent Drafts

There are no drafts at the moment

WordPress Blog

Event Organizers Unite! July 13, 2012

I'm happy to announce the formation of a new official contributor group within the WordPress project for the organizers of in-person events that promote WordPress. Though there are hundreds of people around the globe organizing WordCamps, WordPress meetups, hackathons, free classes and the like, since their "projects" were all happening locally there was nev [...]

WordPress 3.4.1 Maintenance and Security Release June 27, 2012

WordPress 3.4.1 is now available for download. WordPress 3.4 has been a very smooth release, and copies are flying off the shelf — 3 million downloads in two weeks! This maintenance release addresses 18 bugs with version 3.4, including: Fixes an issue where a theme's page templates were sometimes not detected. Addresses problems with some category permalink [...]

Other WordPress News

BuddyPress: BuddyPress 1.6.1

WordPress.tv: K. Adam White: Why We Can Have Nice Things: The Future of Front-end Development And WordPress

WordPress.tv: Ben Metcalfe: Optimizing WordPress For Speed And Scale

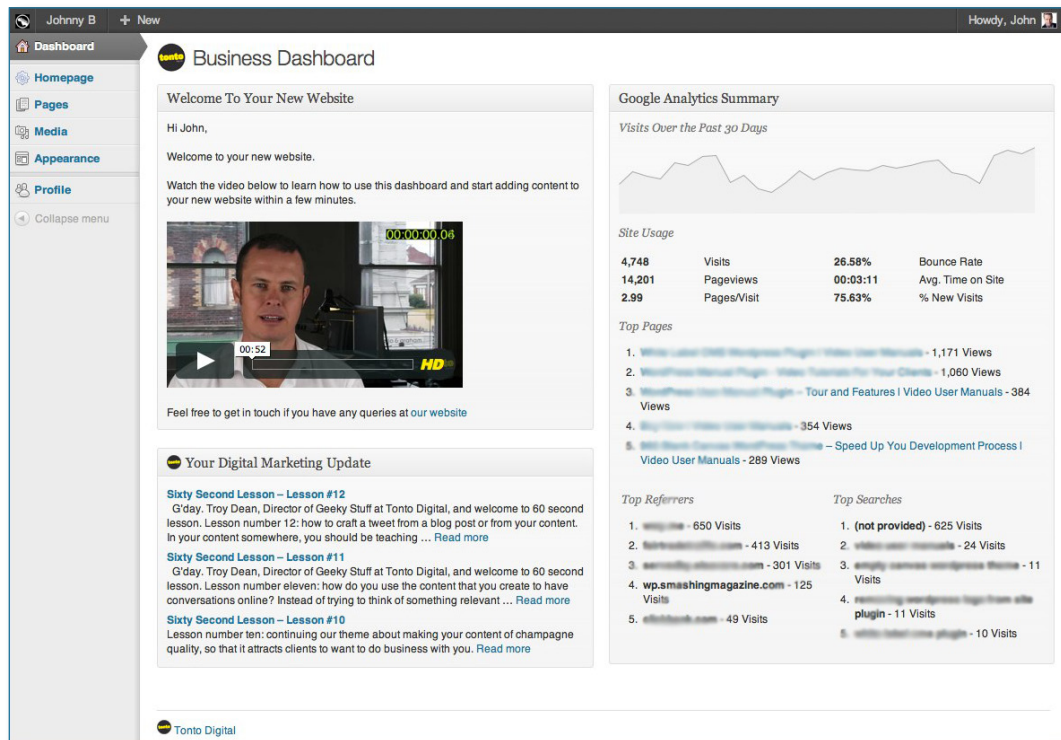
Weblog Tools Collection: WordPress Plugin Releases for 8/13

WordPress.tv: Sam Hotchkiss: WordPress As A Web App Framework

Thank you for creating with WordPress.

Version 3.4.1

To this:



A smart, useful beautifully branded business dashboard with built in training videos, Google Analytics and a simple menu of options.

Let's add so much value to our client that they will never think of using any other web developer, they will refer you clients and they will apologise if they ring you with annoying little questions.

Let's get started.

Introduction

Even though you know WordPress is a world-class content management system, chances are your clients will not have the faintest idea what to do with it.

I'd like to begin with a quote from [Steve Krug](#) about usability from his inspiring book [Don't Make Me Think](#):

After all, usability really just means that making sure that something works well: that a person of average (or even below average) ability and experience can use the thing - whether it's a Web site, a fighter jet, or a revolving door - for its intended purpose without getting hopelessly frustrated.

One of the things I love about Apple products is that they ship with very clear instructions on what to open first and where to start. You are not left to your own devices to figure out how to use your new MacBook

Pro or iPhone. You are guided through the experience with intuitive instructions and software. This is because the *user* of the product has been considered with every decision made. On the flip side if you've ever used a piece of hardware or software that was shipped by an engineer without any user experience consideration, hopeless frustration is inevitable.

WordPress is an awesome piece of open source software and I am grateful to Matt Mullenweg and the entire community for making it what it is today. However, if you use WordPress to build websites for clients, you may have realised that its “usability” struggles by Steve Krug's definition. I posit that this is because WordPress was originally a blogging platform and us developers have dragged it kicking and screaming into a full featured content management system. Therefore we have a hybrid of blog and CMS features competing for attention and screen real estate. [No one is to blame](#), as Howard Jones once sang, it's just that the Internet moves so fast and the team at Automattic are focussed on making WordPress an awesome platform for developers. It's the role of us developers to make WordPress as easy to use out of the box for our clients as an Apple product.

There is a very simple way to do this. I'd like to offer you tips and advice based on my experience and that of my business partner Brian. Nothing is set in stone, and we are constantly evolving our own processes, but contained within this report is over 10 years combined experience building websites for clients using WordPress as a content management system.

In this report you will learn:

- how to provide a simple and beautiful login experience
- why you should only give your clients “Editor” access
- how to build a simple and powerful *business* dashboard
- how to train your clients to use WordPress fast
- how to manage your clients questions more efficiently
- how to add value with basic search engine optimisation strategies
- the essential suite of plugins you need to know

There's also a WordPress Deployment Checklist at the back of this report that you can use to make sure nothing falls through the cracks from here on.

If you implement just a few of these recommendations, you will provide a more seamless experience for your clients and will save yourself time and money on every project you deliver.

Disclaimer: In this report I make a lot of references to two plugins. The [White Label CMS](#), which is freely available from the WordPress plugin repository and the [WP Video User Manuals](#) plugin, which is a premium plugin. My company makes both of these plugins, however all of my recommendations are achievable without the use of any plugins. We just use them because they make our lives easier.

Even though a lot of this report is based on the use of plugins, the plugins are merely tools that allow us to achieve our goal. The philosophy behind this entire strategy is to add enormous value to the client, therefore strengthening the relationship and differentiating ourselves from the pack. This in turn helps us demand higher fees and attracts a higher calibre of client.

I would love to hear your feedback on this report as well as your methods and processes for building websites with WordPress for your clients. Share your feedback on this report at our [feedback page](#).

CHAPTER I

First Impressions

“When you login you’ll notice a lot of information on the dashboard - you can ignore all of it.”

Sound familiar? I grew tired of repeating this every time I delivered a new website to a client and then explaining what all that information was on the dashboard. So I started exploring ways of simplifying the entire WordPress experience for my clients. This was primarily a selfish exercise designed more to save me time rather than make it easier for my client.

I considered every step my client took from the time I sent them the

login URL with their username and password until they were ready to write their first blog post.

Friendly Login

I want my clients to be overwhelmed with how excellent their new website is and how easy it is to use. I know most of my clients have had horrible experiences in the past with web developers and I'm not about to be thrown in the same bucket.

So the first thing I do is give them a friendly login address that is super-easy to remember. Instead of:

`http://website.com/wp-login.php`

I use one line in my .htaccess file which allows them to login at:

`http://website.com/login`

That one line comes courtesy of one of my heroes, Chris Coyier, co-author of the fabulous book [Digging Into WordPress](#).

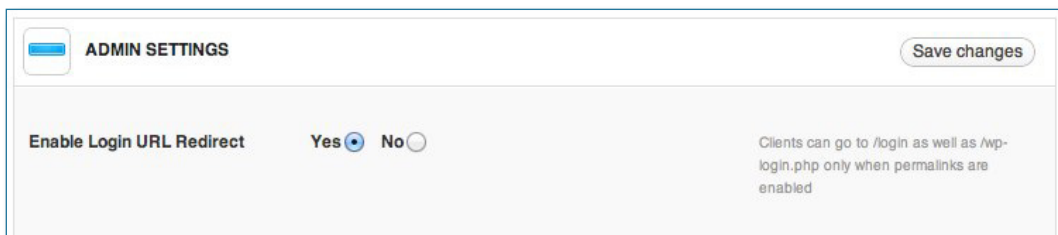
Simply add this line to your .htaccess file, before any WordPress rewrite rules.

```
RewriteRule ^login$ http://yoursite.com/wp-login.php [NC,L]
```

There is a detailed explanation of what this line actually does over at digwp.com - all you need to know for now is that it works.

Oh, and if you have no idea what an .htaccess file is or where to find it - check out [this article](#) on the official WordPress codex.

Tip • Of course, you can always install a plugin to achieve this too. There is the Pretty Login URL over at PlanetOzh.com or you can use our preferred White Label CMS plugin.



The screenshot shows a web interface for 'ADMIN SETTINGS'. At the top left is a blue tab icon, and at the top right is a 'Save changes' button. The main content area has the label 'Enable Login URL Redirect' followed by two radio buttons: 'Yes' (which is selected) and 'No'. To the right of these buttons is a small text note: 'Clients can go to /login as well as /wp-login.php only when permalinks are enabled'.

Enabling login redirect with the White Label CMS plugin

Now that my client has a user-friendly login address, my next mission is to prevent any confusion when they arrive. So instead of showing them

the standard WordPress login page like this:



The login page with a standard WordPress installation as of version 3.4

I like to show them a personalised login page, like this:



A re-branded login page using the White Label CMS plugin

This saves any unnecessary questions like “What’s WordPress?”. More importantly though, it makes the client feel comfortable because they are dealing with something familiar. Login pages are ubiquitous on the Internet so the concept of a user name and password is not a foreign one and their own logo puts them at ease and makes them feel at home.

This is very easily achieved using the White Label CMS plugin.

Login

Make background colour white

Yes ☐ No ☒

This will make the login screen have a white background. Useful if your logo isn't transparent.

Custom Login Logo

This logo will appear on the login page. It should be about 300px by 80px.

Customise the login screen with the White Label CMS plugin

This is one small action that will begin to set you apart from the bad experiences they have had with web developers.

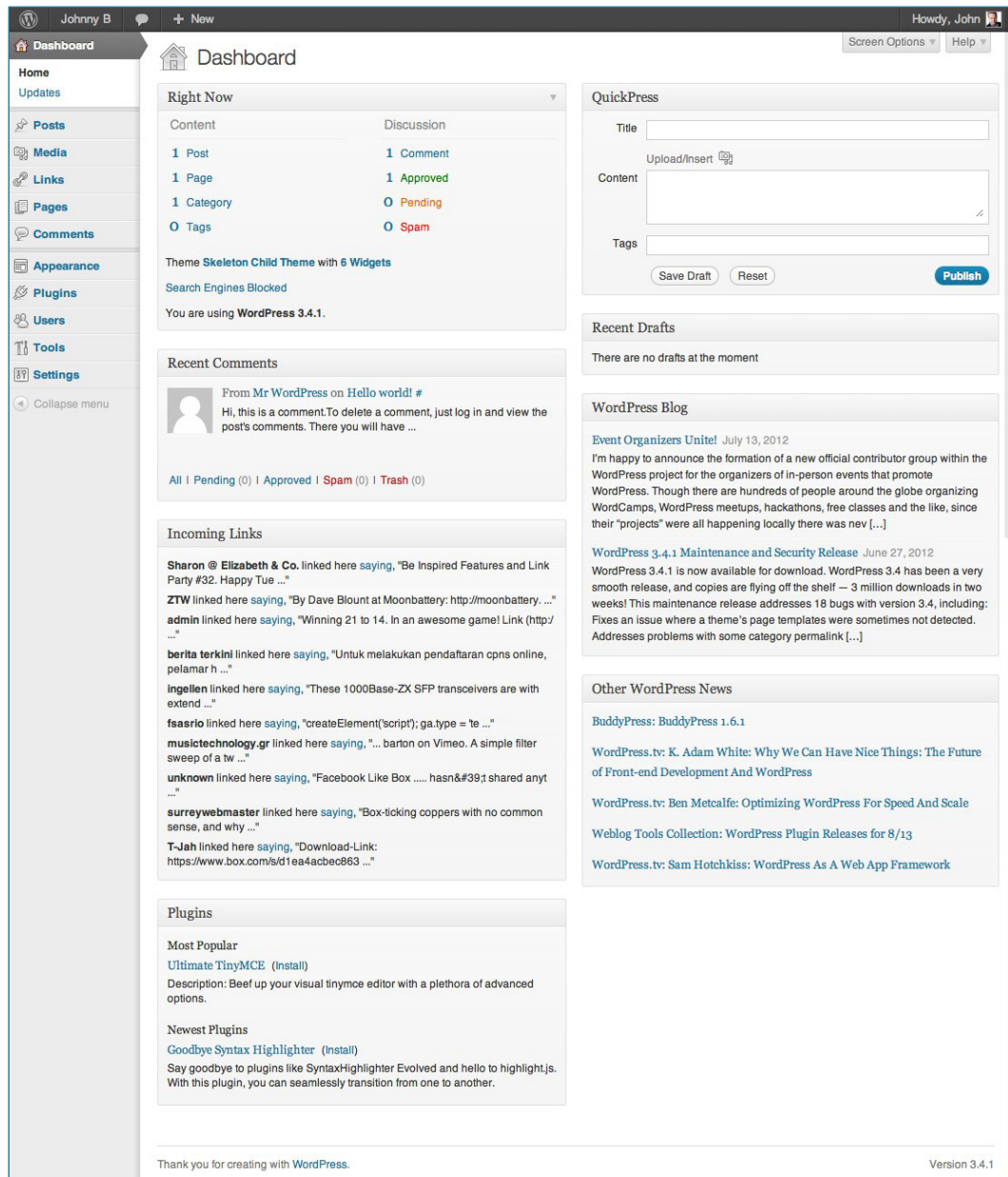
CHAPTER II

Need To Know Basis

“I really don’t have to worry about a client not seeing border-radius generated rounded corners if they themselves use Internet Explorer or Opera, because they simply do not know that something is missing.” [Andy Clarke](#).

As far back as 2008, one of my web design heroes Andy Clarke was advocating that we stop showing clients static designs and instead get them to sign off on designs in the browser. I strongly recommend you read [this article](#) to understand why this is a great idea. The takeaway point is that clients do not know something is missing if they’ve never seen it.

So if I give my client administrator access to their website and they log in to a standard WordPress installation, they will see the following:



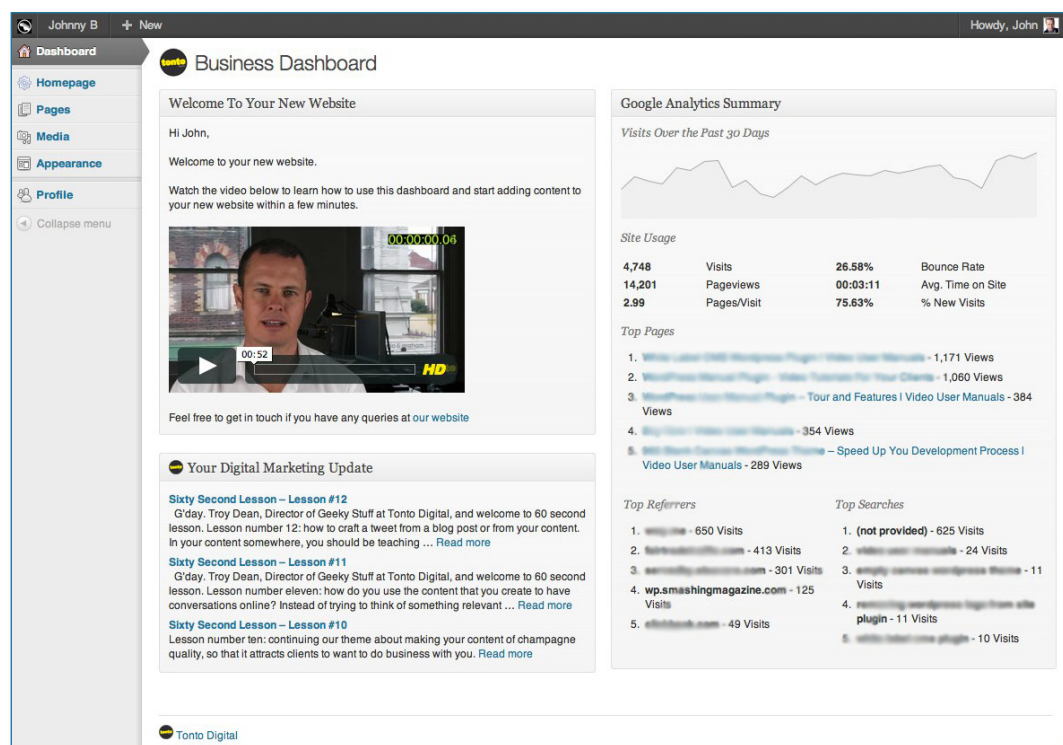
The administrators dashboard with a standard WordPress installation

In the interest of saving a my client a lot of confusion and myself a lot of

time, I like to do two things:

1. I only give my clients “Editor” access to their website, and
2. I simplify the dashboard by removing everything they will not know is missing and leaving only what they need to know. I call this a “Business Dashboard”.

Let me show you what that looks like and then I’ll explain how and why.



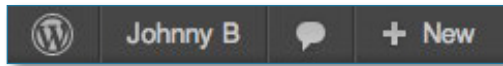
A simplified “Business” dashboard is far more useful to the client

Restricted Access

That's right. In case you missed it, I only give my clients "Editor" access to their website. Why? Because the majority of my clients do not have the technical ability to install plugins, modify their theme or add widgets. They also don't know there is such a thing as an "administrator". On the rare occasion that a client actually asks for administrator access, I make it very clear that if they break anything there will be a fee involved for me to fix it. That usually scares most people off. Anyone who does request administrator access must know there is such a thing and therefore usually has a good enough understanding of how WordPress functions and is an advanced user, not just a content editor. However, over 90% of my clients only have Editor access to the system which makes everyone's life a lot easier.

The Business Dashboard

Now let's take a closer look at the features of the "Business Dashboard". The first thing I do is replace the WordPress logo at the top left of the admin bar with the clients logo - 16px by 16px. This saves them asking the question "What does that little 'W' in the corner mean?"



The standard WordPress admin bar



A re-branded WordPress admin bar

This is achieved very simply by turning off the WordPress logo and uploading a 16px x 16px version of the clients logo via the White Label CMS plugin in the WordPress dashboard.



The admin bar settings in the White Label CMS plugin

A MORE MEANINGFUL TITLE

Next, I rename the dashboard to something more enticing to the client, like “Business Dashboard” or “Online Shop Dashboard”. I also replace

the default “Home” icon with my logo so every time my client logs in they are reminded of my company and the excellent job we did.

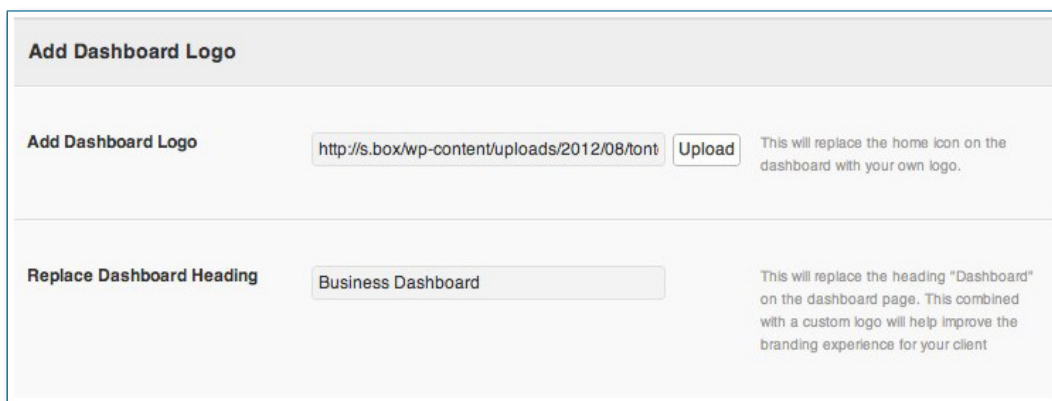


The standard WordPress dashboard title and icon



A re-branded and custom dashboard title and icon

Again, this is done very easily via the White Label CMS plugin.

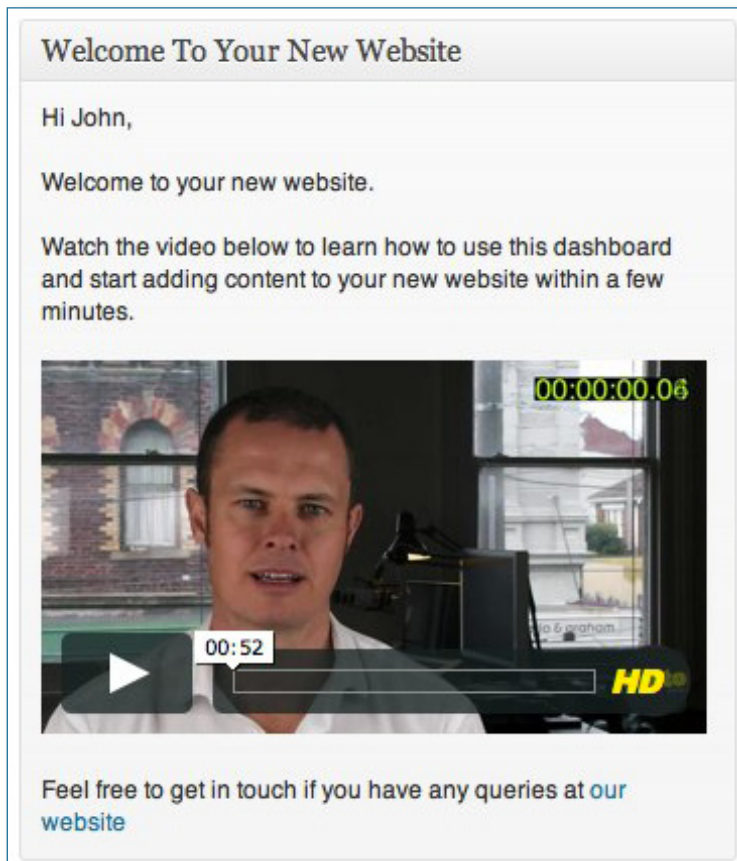
A screenshot of the "Add Dashboard Logo" settings page in the White Label CMS plugin. The page has a light gray header with the title "Add Dashboard Logo". Below the header, there are two main sections. The first section, titled "Add Dashboard Logo", contains a text input field with the URL "http://s.box/wp-content/uploads/2012/08/tont", an "Upload" button, and a note: "This will replace the home icon on the dashboard with your own logo." The second section, titled "Replace Dashboard Heading", contains a text input field with the text "Business Dashboard" and a note: "This will replace the heading 'Dashboard' on the dashboard page. This combined with a custom logo will help improve the branding experience for your client".

The dashboard logo and heading settings in the White Label CMS plugin

A WARM WELCOME

The next thing you'll notice about my customised dashboard is that it does not include any of the standard panels that WordPress throws up out of the box, like "Right Now", "Recent Comments", "Incoming Links", "Plugins", "QuickPress", "Recent Drafts", "WordPress Blog" or "Other WordPress News". This has saved days of my life not having to explain what these all mean.

Instead, I include my own welcome panel that addresses my client by name, introduces them to their dashboard and shows a brief video explaining how to use the dashboard and how to start making changes to their website straight away.



A custom welcome panel on the dashboard

The video I made is generic enough that I can reuse it for every client and if there are any specific quirks I need to cover off, like custom post types, I can just shoot an additional video, add it to my [Vimeo Pro](#) account and embed the iframe code back into the dashboard.

Tip • Now that the WordPress dashboard is iPad compatible, using Vimeo Pro means your videos will be iPad friendly too.

Add your own Welcome Panel? Yes <input checked="" type="radio"/> No <input type="radio"/>		This will appear on the dashboard. We recommend providing your contact details and links to the help files you have made for your client.
Welcome Panel Settings		
Visible To	Editor <input type="button" value="v"/>	This means the welcome panel will appear for users with roles higher or equal to the one chosen.
Title	Welcome To Your New Website	The title of your dashboard panel.
Description	<pre> Hi John,

 Welcome to your new website.

 Watch the video below to learn how to use this dashboard and start adding content to your new website within a few minutes.

 <iframe src="http://player.vimeo.com/video/42957525? title=0&byline=0&portrait=0&color=feed07" width="330" height="185" frameborder="0" webkitAllowFullScreen mozallowfullscreen allowFullScreen"></iframe>

 Feel free to get in touch if you have any queries at our website </pre>	Please add the text in html format here.

Add a custom welcome panel to the dashboard with the White Label CMS plugin

There are three key elements to consider here:

1. use the White Label CMS plugin to remove all the standard dashboard panels (except for administrators)
2. add your own welcome panel via the White Label CMS plugin, and
3. create a snippet of html for your welcome panel that you can reuse

over and over again.

DASHBOARD PANELS			Save changes
Hide 'Right Now'	Yes <input checked="" type="radio"/> No <input type="radio"/>	Hides the right now panel	
Hide 'Recent Comments'	Yes <input checked="" type="radio"/> No <input type="radio"/>	Hides the comments panel	
Hide Other Dashboard Panels	Yes <input checked="" type="radio"/> No <input type="radio"/>	These are all the other default dashboard panels	
Show Dashboard To Admin	Yes <input checked="" type="radio"/> No <input type="radio"/>	All panels will appear for the admin	

The dashboard panel settings in the White Label CMS plugin

I have snippet of html stored in my Google Docs intranet which I reuse for every project. All I need to do is change the first name and paste it into the White Label CMS plugin and click save.

Here is my html snippet from my intranet:

```
Hi [First Name],<br/><br/>
Welcome to your new website.<br/><br/>
Watch the video below to learn how to use this dashboard
and start adding content to your new website within a few
minutes.<br/><br/>
<iframe src="http://player.vimeo.com/video/xxxxxxx"
width="330" height="185" frameborder="0" webkitAllowFullScreen
mozallowfullscreen allowFullScreen></iframe><br/><br/>
```

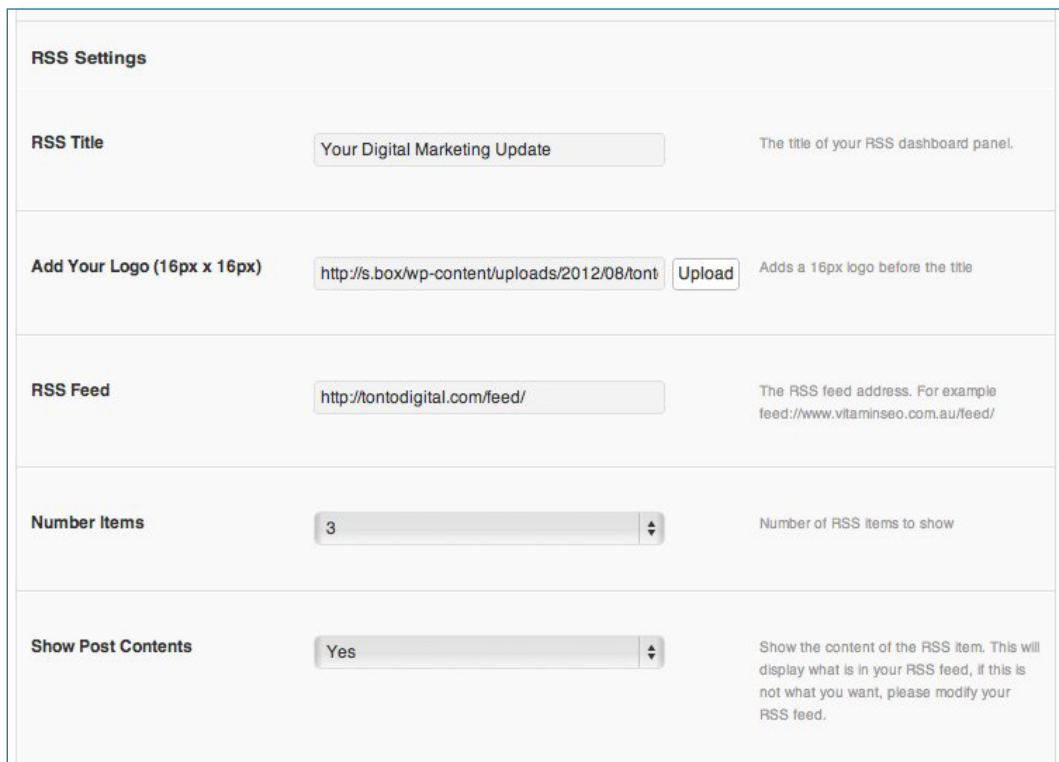

Feel free to get in touch if you have any queries at our website

Obviously you need to update this with your details, such as your own vimeo iframe code and the link to your website.

FEED THE FIRE

Directly underneath my custom welcome panel, I include another dashboard panel that displays the most recent three posts from my company blog. This is a great way to automatically nurture the relationship you have with the client by constantly feeding them new information every time they login. This helps position yourself as an expert in your field and generate new business from the client in the future.

It's also very easy to setup by adding an RSS panel to the dashboard using the White Label CMS plugin.



The screenshot shows a settings panel titled "RSS Settings". It contains five sections, each with a label, a form field, and a description:

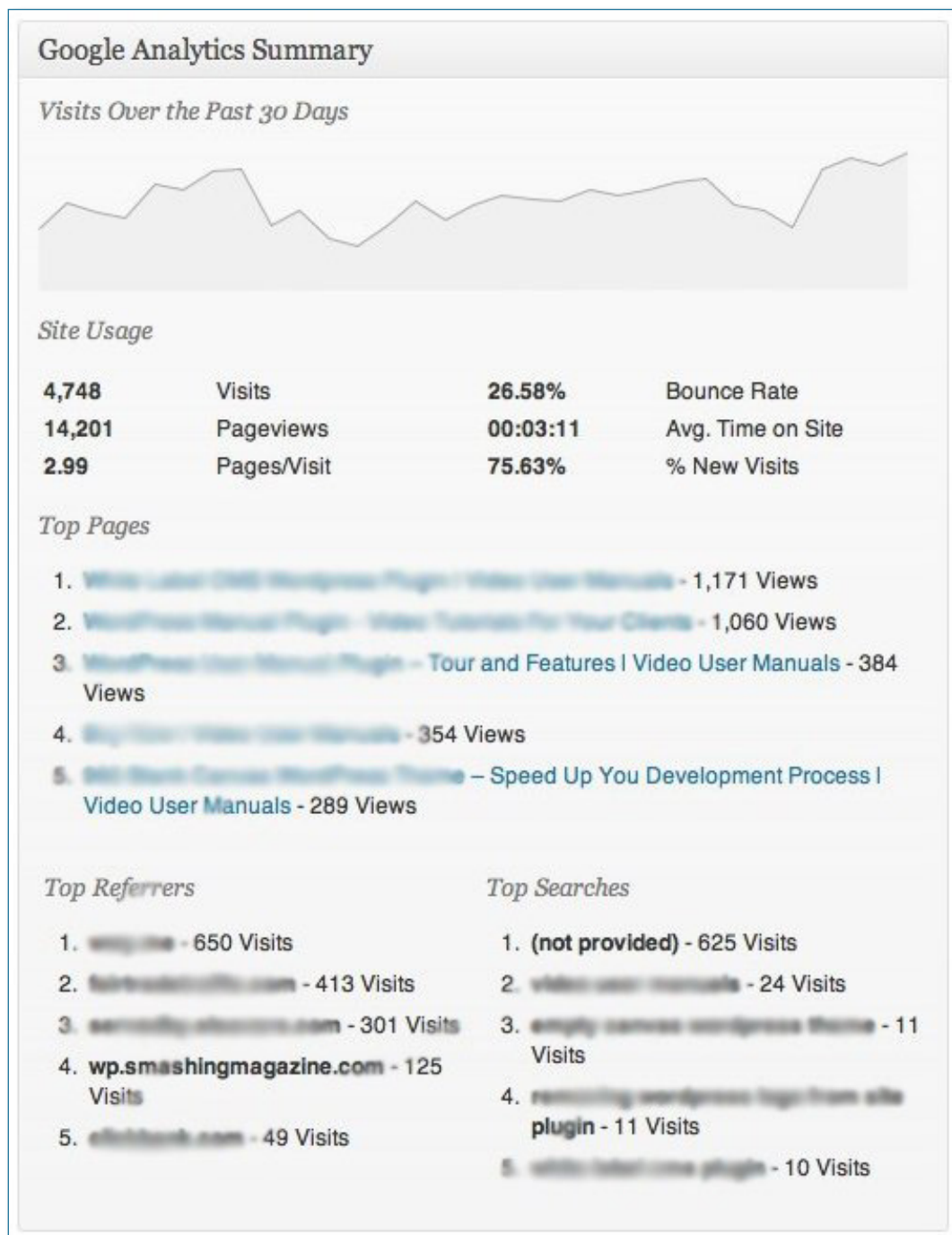
- RSS Title:** A text input field containing "Your Digital Marketing Update". Description: "The title of your RSS dashboard panel."
- Add Your Logo (16px x 16px):** A text input field containing "http://s.box/wp-content/uploads/2012/08/tont" and an "Upload" button. Description: "Adds a 16px logo before the title"
- RSS Feed:** A text input field containing "http://tontodigital.com/feed/". Description: "The RSS feed address. For example feed://www.vitaminseo.com.au/feed/"
- Number Items:** A dropdown menu showing "3". Description: "Number of RSS items to show"
- Show Post Contents:** A dropdown menu showing "Yes". Description: "Show the content of the RSS item. This will display what is in your RSS feed, if this is not what you want, please modify your RSS feed."

Adding an RSS widget to the dashboard with the White label CMS plugin

PERFORMANCE ANALYSIS

The final dashboard panel I add to the “Business Dashboard” is a Google Analytics widget that shows the client key metrics over the past 30 days. This is what I call a “1 percenter”. A level of attention to detail that instantly elevates me above the average web developer and shows I am serious about adding value to their business.

The [Google Analyticator](#) plugin makes this very easy to set up.



Google Analytics widget on the dashboard using the Google Analyticator plugin

At the time of writing, development and support of the Google Analyticator plugin had been dropped due to a change in Google's API and


time constraints of the plugin author. You can read the [full article on the authors website](#). This means that some people have had difficulty getting this plugin to authenticate with Google Analytics. However, following the instructions posted by Geet Jacobs in the [WordPress support forum](#) for this plugin, we managed to get it working and it still works a treat.


Having said that, there are other plugins that will do the same job. If you have no luck with Google Analyticator, try [Web Ninja Google Analytics](#) or [Googlyzer](#).

REMOVE TEMPTATION

To save even more confusion, I like to remove any tempting dashboard menu items that the client does not need. If the client has been given Editor access only, most of the unnecessary menus will already be hidden. However the, “Posts”, “Comments” and “Tools” menus are still visible and I want to remove these. Sometimes I will leave the “Posts” menu if the client is going to be writing blog posts, however this is rare.

Hiding menus is easy using the White Label CMS plugin.


MODIFY MENUS
Save changes


 These changes will only effect people with the user role of **Editor**. You are currently logged in as the admin, so you will not see any changes in the menus until you login with a different user role.


Choose A CMS Profile	<input checked="" type="radio"/> Custom <input type="radio"/> Website <input type="radio"/> Blog	Which profile best fits your clients needs?
Hide Posts Menu	<input checked="" type="checkbox"/>	Hides Posts & Comments sections
Hide Media Menu	<input type="checkbox"/>	Hides Media from left menu
Hide Links Menu	<input checked="" type="checkbox"/>	Hides Links from left menu
Hide Pages Menu	<input type="checkbox"/>	Hides Pages from left menu
Hide Comments Menu	<input checked="" type="checkbox"/>	Hides Comments from left menu
Hide Profile	<input type="checkbox"/>	Hides Profile menu item from left menu
Hide Tools	<input checked="" type="checkbox"/>	Hides Tools from left menu

Hiding menus using the White Label CMS plugin

Hang on a minute! What about the fabulous WordPress custom menu system? How do I give my clients access to that so they can add pages to their main navigation or footer menu?

Fear not. We have an option for that too.

Simply give your Editors access to the Appearance menu and then hide the other options.



The following change will display the Widgets or Menus or Background or Header option in Appearance to users with the role of **Editor**. Please refer to the help tab to understand the consequences of enabling this option.

Access To Appearance Menu Yes ☒ No ☐

This will give the editor access to the appearance section. You can customise what they have access to.

The Appearance Menu		
Hide Themes	<input checked="" type="checkbox"/>	Removes the Themes option under the Appearance tab.
Hide Widgets	<input checked="" type="checkbox"/>	Removes the Widgets option under the Appearance tab.
Hide Menus	<input type="checkbox"/>	Removes the Menus option under the Appearance tab.
Hide Theme Options	<input checked="" type="checkbox"/>	Removes the Theme Options option under the Appearance tab.
Hide Header	<input checked="" type="checkbox"/>	Removes the Header option under the Appearance tab.

Give “Editors” access to the “Menus” menu item with the White Label CMS plugin

USEFUL IS THE NEW COOL

Finally, I like to add something really useful to my client’s navigation menu. The ability to edit their home page without having to dig into a template. There are a couple of ways you can do this. You could base the home page template on custom post types, or you could build your own admin page to allow your client to change certain aspects of the home page. We developed our own plugin and admin options page based on this [excellent tutorial](#) by Rohan Mehta at Net Tuts+.

Whichever option you choose, adding a new item to the menu so your client can edit their home page requires you to use the `add_menu_page`

function built in to WordPress. There is a full explanation of this function in [this article in the WordPress codex](#).

I'll share the function I use when I build a home page based on a Custom Post Type. This lives in my theme's functions.php file:

```
add_action('admin_menu','my_custom_menu');

function my_custom_menu () {
if ( function_exists('add_menu_page') && ! current_user_can(
'manage_options' ) ) {
    add_menu_page('Homepage','Homepage',o,'edit.php?post_
type=td_home_slides','vseoha_admin','/wp-admin/images/generic.
png','3');
    }
}
```

This function adds a new menu to the WordPress admin menu called “Home page” which takes the user to the edit screen for a custom post type called “td_home_slides” (see [custom post type naming conventions](#)). Using the position of ‘3’ places this new menu page directly underneath the “Dashboard” menu.

Now I am hiding all the unnecessary menu items from my client and only showing them “Dashboard”, “Media”, “Pages”, “Appearance” (so they can access the custom menu feature), “Profile” and “Home page”

(my custom post type editor).

THE ORDER OF THINGS

Now let's put the remaining menu items in some kind of order that makes sense based on how often our client is likely to use them. My preferred order is "Dashboard", "Home page", "Pages", "Media", "Appearance", then a separator and finally "Profile".

Thanks to [Mike Schinkel](#) for this excellent [WordPress menu API](#), it's as simple as dropping his wp-admin-menu-classes.php file into your theme's directory and then placing this small function in your theme's functions.php file:

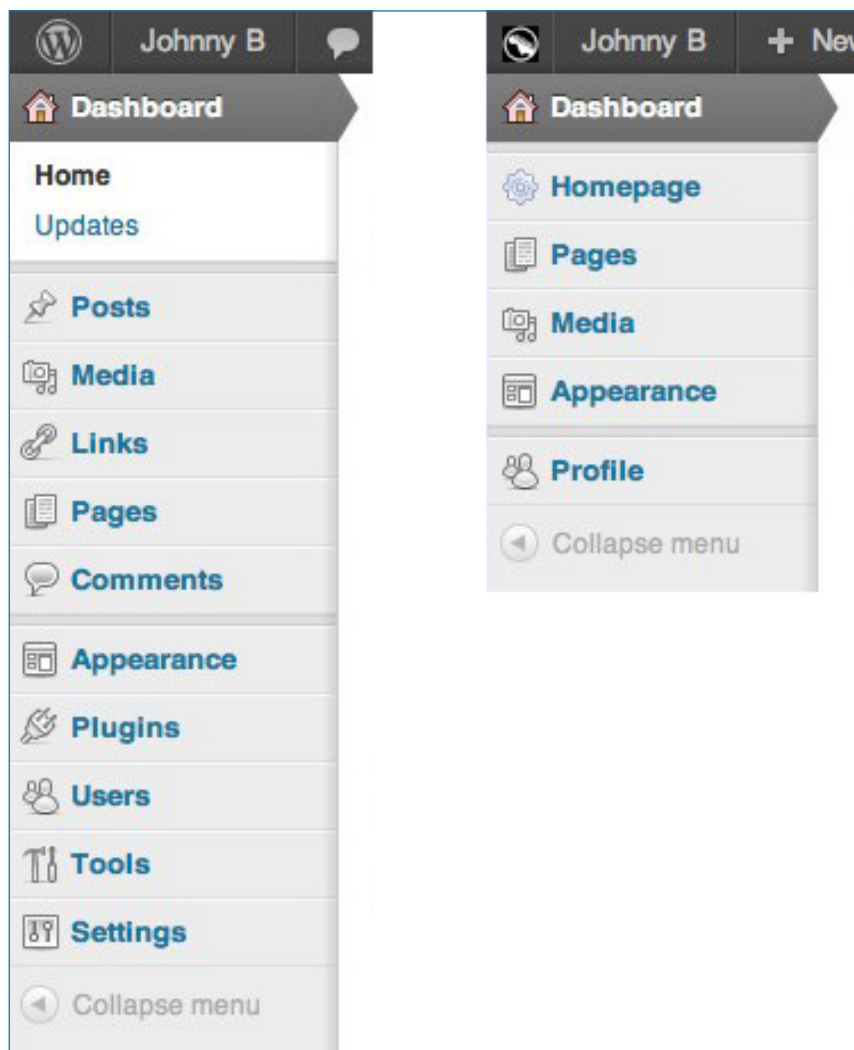
```
require_once('wp-admin-menu-classes.php');
add_action('admin_menu','my_admin_menu');
function my_admin_menu() {
    swap_admin_menu_sections('Pages','Media'); // Swap location
    of Pages Section with Media Section
}
```

So all I'm doing here is swapping the "Pages" and "Media" sections. Go ahead and try it out. It's pretty nifty.

There is also a [great function here](#) that allows you to control the order of every item in your admin menu.

Now we have a simple, clean, easy to understand menu structure that will not cause any confusion.

Let's take a look at the menu before and after our customisation.

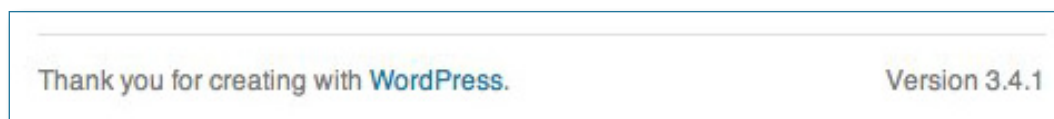


The WordPress admin menus before and after customisation

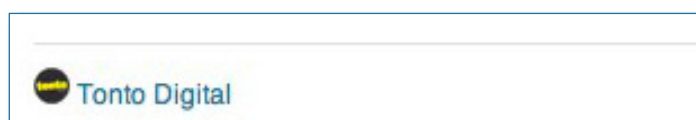
THANK YOU FOR CREATING WITH WHO?

We all know WordPress is awesome, but our client doesn't know or care what WordPress is. They just think we are awesome for making their new website so easy to update. So I like to get rid of the WordPress mention and version number in the admin footer and replace it with some-

thing more useful. Like my logo and a link back to my website.

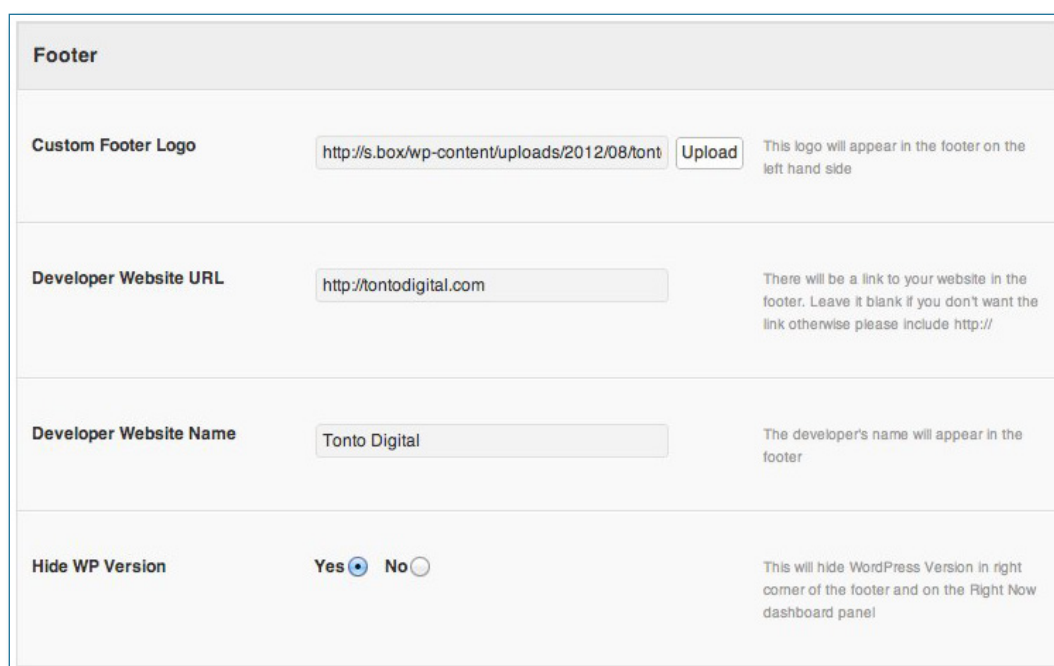


The standard WordPress admin footer



A re-branded footer using the White Label CMS plugin

Again, this is easily achieved using the White Label CMS plugin.

A screenshot of the White Label CMS plugin's footer customization interface. The interface is titled "Footer" and contains four sections, each with a label, a text input field, and a description. 1. "Custom Footer Logo" with a text input field containing "http://s.box/wp-content/uploads/2012/08/tont" and an "Upload" button. The description says: "This logo will appear in the footer on the left hand side". 2. "Developer Website URL" with a text input field containing "http://tontodigital.com". The description says: "There will be a link to your website in the footer. Leave it blank if you don't want the link otherwise please include http://". 3. "Developer Website Name" with a text input field containing "Tonto Digital". The description says: "The developer's name will appear in the footer". 4. "Hide WP Version" with radio buttons for "Yes" (selected) and "No". The description says: "This will hide WordPress Version in right corner of the footer and on the Right Now dashboard panel".

Customising the footer in the White Label CMS plugin

THE NOT-SO OBVIOUS

Finally, in an attempt to eliminate 95% of incoming phone calls from newbie clients asking irrelevant questions, there are three other things I want to remove from the dashboard.

1. The screen options drop down
2. The help drop down
3. Any version update nag notifications whenever a new stable release of WordPress is set free

This can all be achieved with three little radio buttons in the White Label CMS plugin.



The screenshot shows the 'ADMIN SETTINGS' page of the White Label CMS plugin. It features a 'Save changes' button in the top right corner. Below the header, there are three settings, each with a label, radio buttons for 'Yes' and 'No', and a descriptive note:

Setting	Yes	No	Description
Hide Nag Update	<input checked="" type="radio"/>	<input type="radio"/>	This will hide the Nag Update for out of date versions of WordPress
Hide Help Box	<input checked="" type="radio"/>	<input type="radio"/>	This will hide the Help Box dropdown
Hide Screen Options	<input checked="" type="radio"/>	<input type="radio"/>	This will hide the Screen Options dropdown

Hiding the update nag, help and screen options with the White Label CMS plugin

This means that whenever you or other administrators login you will still see the WordPress version update notification under **Dashboard > Updates** but anyone without administrator access will not be notified.

LET'S RECAP

This is what my client will now experience when I hand over the keys to their new website:

1. an easy to remember login URL of `http://website.com/login`
2. a clean and simple login page with their logo
3. a simple “Business Dashboard” once they login with their logo, a welcome video, RSS feed of my blog, and Google Analytics widget
4. a simple menu of items to choose from including a home page editor, pages, media library, custom menus and profile settings
5. no mention of WordPress, version numbers or any other distractions

My client now has an awesome content management system they can start using immediately to manage the content on their website.

Phew!

CHAPTER III

Where's The Manual?

Well I would have read the manual before I called you, however this is no manual, that's why I'm calling you.

Televisions ship with user manuals. Automobiles ship with user manuals. Computers ship with user manuals.

WordPress does not. There are a several good reasons why you should provide a user manual for your clients. It will save you lots of time answering the obvious questions about the visual editor, the media library, how to upload images and how to paste text in from that dreaded Microsoft Word program that people still use. It will make you look more professional and strengthen the relationship you have with the client

which could lead to more business or referrals to new clients. It allows you to get on with doing what you do best without being interrupted by a dozen phone calls when the client forgets something. It's the right thing to do.

So without giving you too much of a sales pitch, here are the basic features of the [WP Video User Manual](#) plugin.

WP Video User Manual

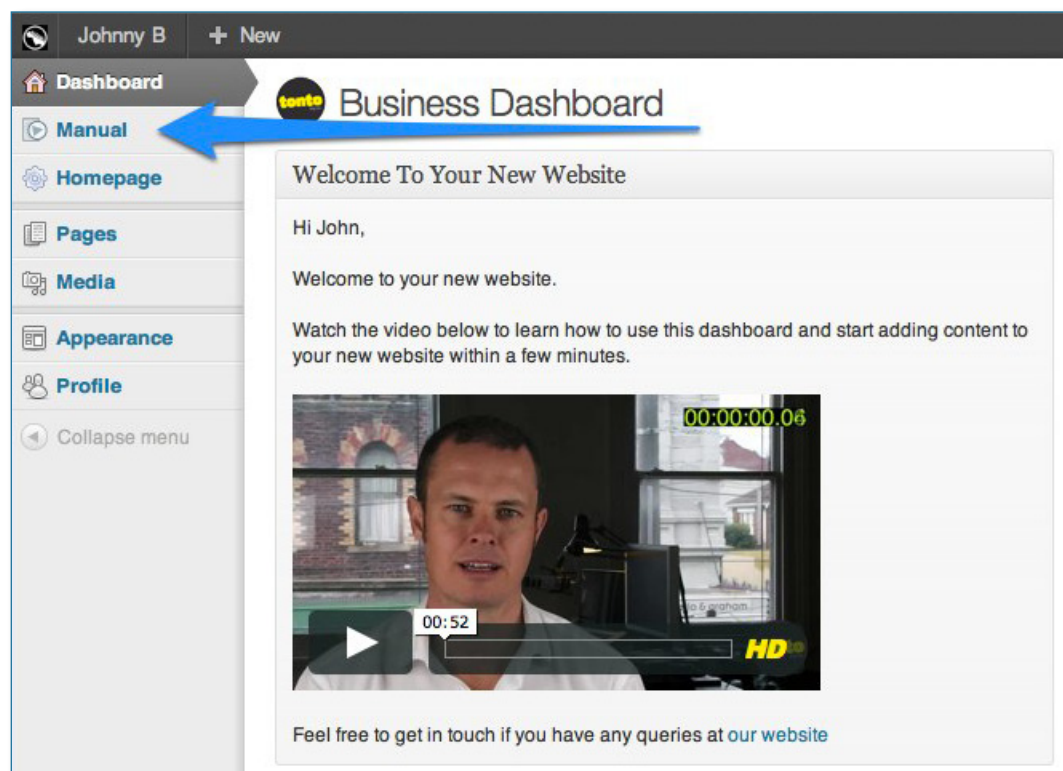
The [WP Video User Manual](#) plugin adds a menu item to the dashboard called “Manual”. It contains over 35 high quality, professionally produced screencast video tutorials that cover everything an “Editor” can do in WordPress. The videos are iPad compatible too.

It also contains a 100 page written manual with over 100 screenshots, WP style navigation, search tool and index for those who prefer to learn by reading. The written manual and videos explain every button on the visual editor toolbar, the media library, image editing, basic text formatting, adding pages and posts, categories, tags, comments and more.

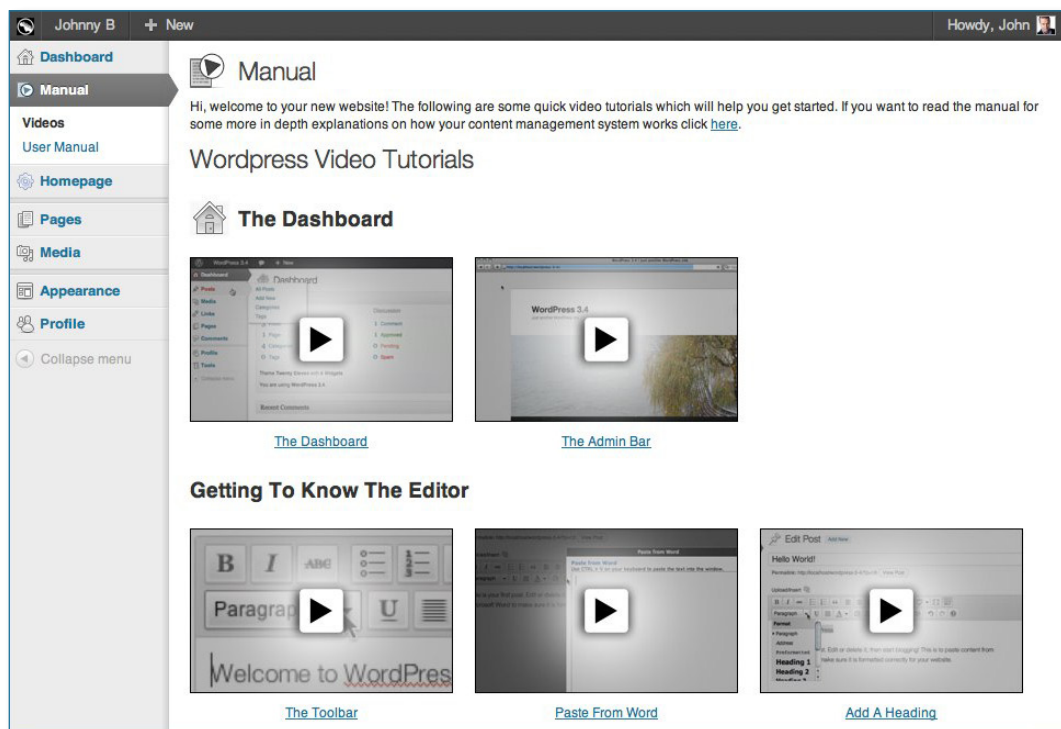
You can customise the plugin to only show the videos your client needs and you can re-brand it with your own logo for a very professional training solution. You can also add your own custom videos for each client.

At the time of writing, the videos are available in native US, English and Australian accents as well as Spanish. Oh, and all the videos and screenshots get updated automatically with every stable release of WordPress, which means new videos get added and updated via the cloud.

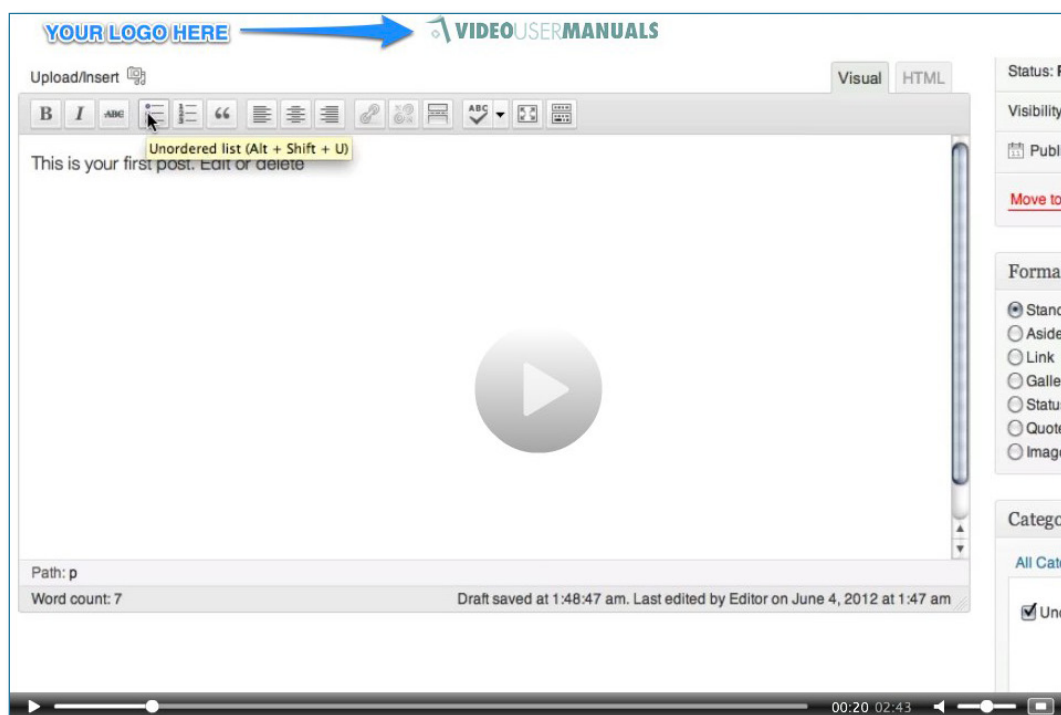
Here are some screenshots of the plugin in action.



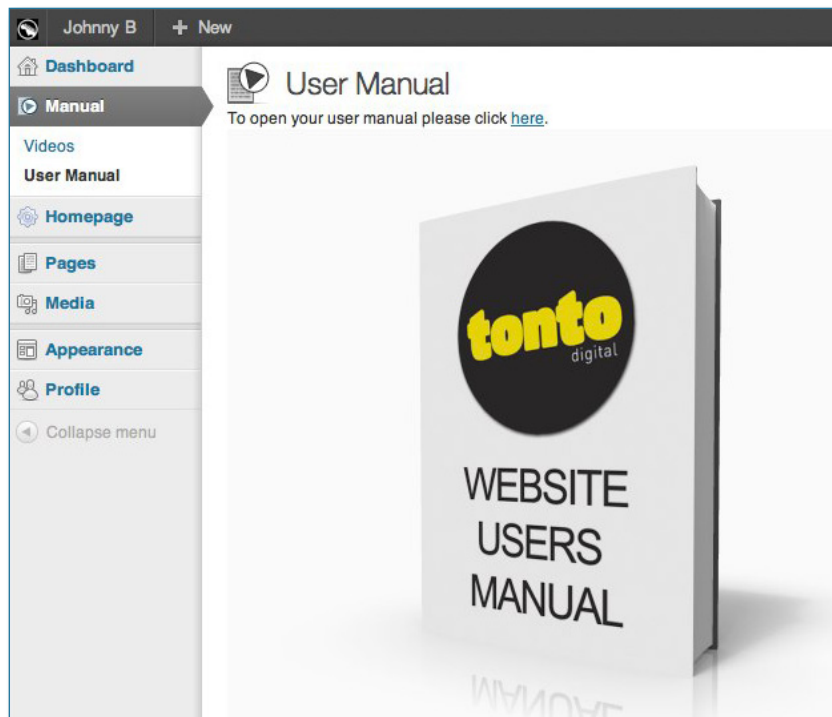
The manual menu in the dashboard



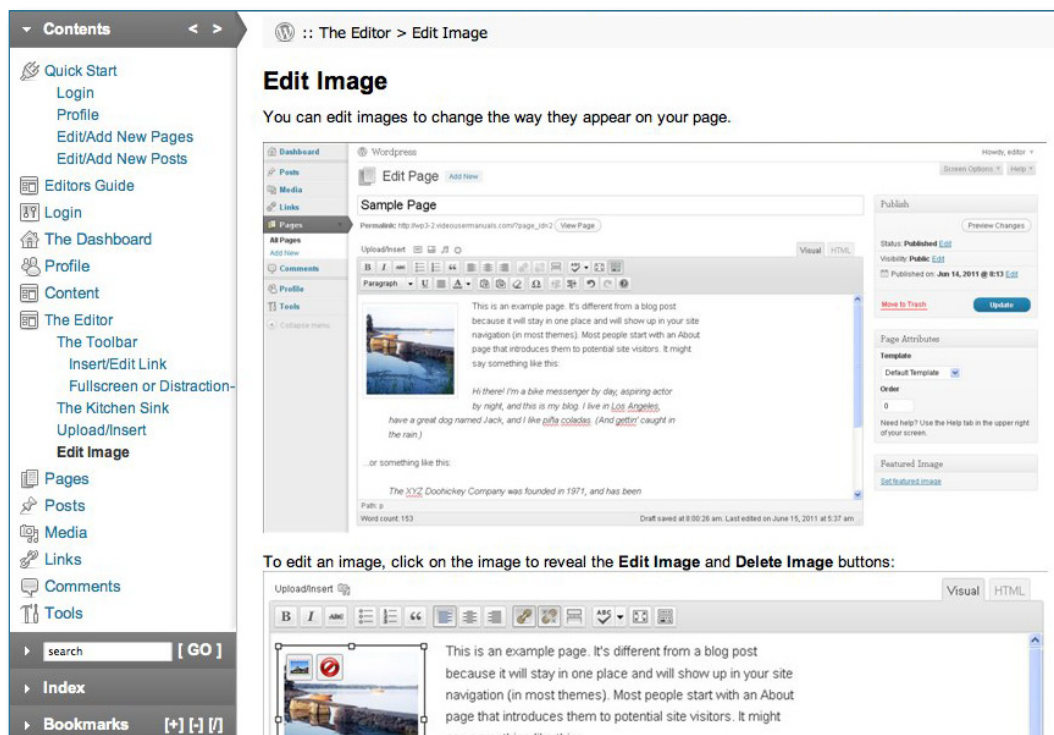
The WP Video User Manual plugin videos in the dashboard



The iPad friendly video player that you can re-brand



Re-branded written manual in the dashboard



The written manual with WP style navigation, search tool and index

This plugin was originally written as a 100 page PDF for me to give to my clients. Over the last 4 years it has evolved into the premium video tutorial plugin for WordPress developers to give to their clients.

It saves us hours every month and is a real talking point with clients who are blown away at the professional level of support they receive from us via this plugin.

Clients can get up and running and managing content on their own website within 30 minutes of logging in and they rarely call us with questions about how to use WordPress.

They have never had an experience with a web developer like this before.

Thousands of WordPress developers all over the world use this plugin to train their clients quickly and easily.

Learn more about the [WP Video User Manual](#) plugin here.

Incoming Distractions

Now that you have your client up and running and managing their own website with a simple Business Dashboard and a built in video tutorial user manual, you can get on with building your next WordPress website. That is until your client calls you or sends you an email with a query about one of those custom post types you wrote or some new feature they realise they need.

How do you manage these incoming queries so that they don't distract you when you're in the middle of some awesome CSS ninja moves?

[Desk.com](https://desk.com)

No, I'm not an affiliate and I use the free plan anyway.

Desk.com is a hosted help desk solution that is simply awesome. It allows you to effectively manage and keep track of all your incoming questions (called "Cases") in a time efficient manner. It prevents things falling through the cracks, frees up your email inbox and has a beautiful user interface.

You can re-brand Desk.com and set it up to map from your own domain by simply adding a CNAME record to your DNS, so your clients can visit <http://support.your-domain.com> and see a beautiful, easy to use support desk.

***Tip:* One of the best features of Desk.com is that it allows you to store articles (including videos and screenshots) in a knowledge base. This means, once you answer a common question, you can store it your knowledge base and Desk.com will attempt to answer your clients questions in the future from the articles in the knowledge base before distracting you with a new “Case”.**

I could go on for days about how powerful Desk.com is and how much time it saves me. Check it out.

It's very cool. And free.

Desk.com

CHAPTER IV

Directing Traffic

Basic Search Engine Optimisation is not a luxury. It's a must have. Handing over a website to a client without it is lazy, irresponsible and unnecessary.

Search engine optimisation has bewildered web developers for a long time and all the conflicting opinions about how the Google algorithm works and the best practices to adopt make it difficult to know where to start. I believe this is why most web developers don't bother.

I am no expert, but we have had some very good results in-house by following a basic process of making sure the fundamentals are in place.

This guide is designed to help you implement some basic SEO tactics that will help your clients website get indexed by Google and hopefully start to appear in search results.

There are no guarantees with SEO, but this is a good place to start. A lot of these recommendations are based on the work of [Joost De Valk](#) from the Netherlands and his excellent [WordPress SEO Plugin](#).

The Perfect Permalink

There's been a healthy debate for a long time now about the best permalink structure to use in a WordPress site. I've always preferred using the very simple *Post Name* which means your URL looks something like this:

`http://your-website.com/postname/`

This is achieved by setting your permalink structure to:

`/%postname%/`

There is an argument that on a large site you might end up with 2 posts with the same name, so you should use *Category* > *Post Name* as the structure. This means your URL looks like this:

```
http://your-website.com/category/postname/
```

This is done by using this permalink setting:

```
/%category%/postname%/
```

Dion Hulse, a core contributor to WordPress, [gave a presentation](#) at WordCamp in Melbourne 2011 and demonstrated that this permalink structure can slow down your page load time quite dramatically due to the structure of the WordPress database. So we jumped on the recommended permalink structure of *Month* > *Name* which results in URLs like this:

```
http://your-website.com/2012/08/postname/
```

This is set by choosing the following permalink structure:

```
/%year%/monthnum%/postname%/
```

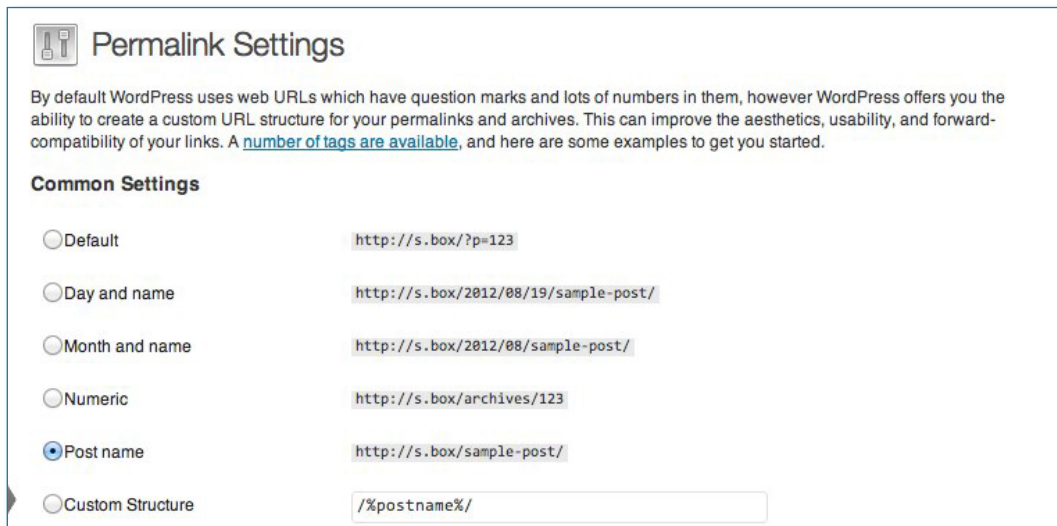

However, our friend Joost De Valk has spoken and written about this at length on his website. He's even had email conversations with Matt Cutts himself from Google and in the end Joost concludes that either *Post Name* or *Category > Post Name* is the ideal permalink structure.

Showing dates in your URLs can decrease your click through rates from search engine result pages as your posts age. The extra load on the WordPress database by using the *Category* in the permalink only applies to large websites with hundreds of pages and this can be overcome with a good caching plugin, which we'll talk about later.

Finally, Chris Coyier at Digging Into WordPress got to the bottom of this issue and [talks about it at length here](#). Essentially, starting your permalink structure with a number is better than text. His preference?

```
/ %post_id% / %postname% /
```

A little weird he admits, but effective. Personally, I'm now in favour of *Post Name* for small to medium websites and *Post ID > Post Name* or *Year > Post Name* for websites that may end up with hundreds of posts.



Setting permalink structures in the WordPress dashboard under Settings > Permalinks

I suggest you read this excellent article and watch the videos with Matt Cutts from Google on [Joost's website](#).

SEO 101

Speaking of Joost, the next thing I recommend is installing his [Word-Press SEO](#) plugin. Unless you know what you're doing you can leave all the default settings as they are and enjoy the benefits of this excellent plugin.

It allows you to write custom SEO titles and descriptions for each page

or post (which I recommend you get into the habit of doing), suggests related keywords based on your focus keyword and shows you what your page will look like on a search engine results page so you can make sure your entry is as enticing as possible to encourage click-throughs.

The screenshot shows the 'WordPress SEO by Yoast' interface with the 'General' tab selected. It features a 'Snippet Preview' at the top showing a search result for 'Lorem Ipsum'. Below this is the 'Focus Keyword' field containing 'lorem ipsum', followed by a list of checks: 'Your focus keyword was found in:', 'Article Heading: Yes (1)', 'Page title: Yes (1)', 'Page URL: Yes (1)', 'Content: Yes (4)', and 'Meta description: Yes (1)'. The 'SEO Title' field contains 'Lorem Ipsum' with a character count of 59 left. The 'Meta Description' field contains a placeholder text with a character count of 32 left. Buttons for 'Find related keywords', 'Generate SEO title', and a 'meta description' link are also visible.

WordPress SEO by Yoast

General Page Analysis Advanced Social

Snippet Preview: **Lorem Ipsum**
s.box/lorem-ipsum/ - Cached
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Focus Keyword: lorem ipsum

Your focus keyword was found in: Find related keywords

Article Heading: **Yes (1)**
Page title: **Yes (1)**
Page URL: **Yes (1)**
Content: **Yes (4)**
Meta description: **Yes (1)**

SEO Title: Lorem Ipsum

Title display in search engines is limited to 70 chars, **59** chars left. Generate SEO title

If the SEO Title is empty, the preview shows what the plugin generates based on your [title template](#).

Meta Description: Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

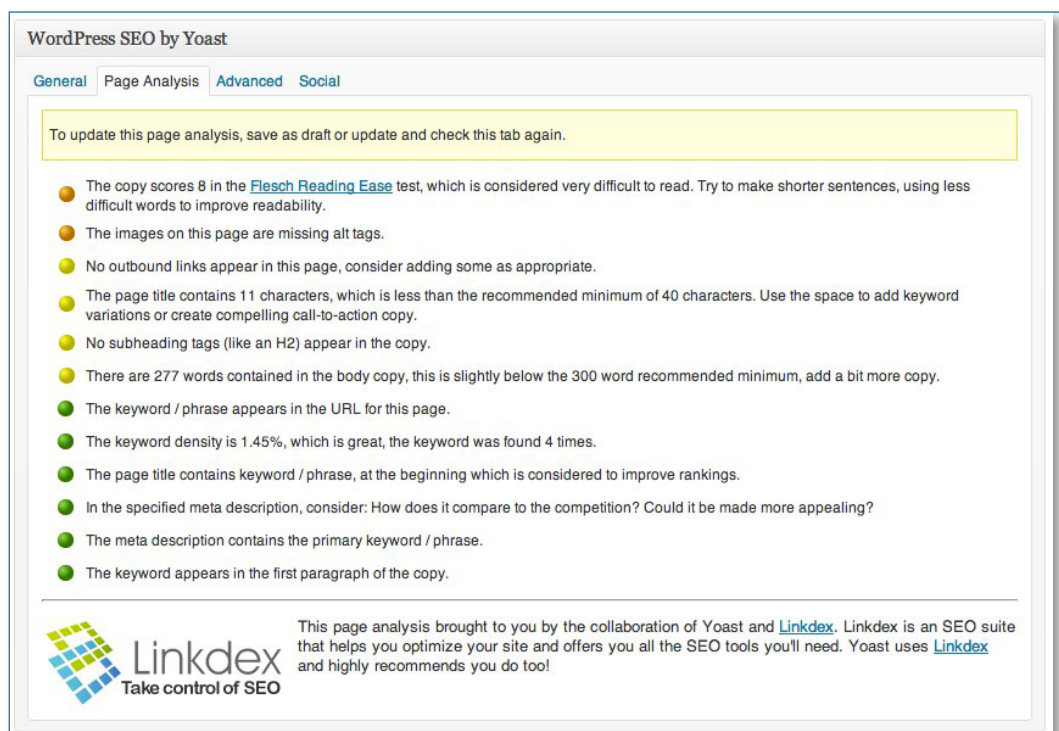
The meta description will be limited to 156 chars, **32** chars left.

If the meta description is empty, the preview shows what the plugin generates based on your [meta description template](#).

WordPress SEO by Yoast General Settings

Based on your focus keyword for a page or post the plugin then analyses your content and gives you hints on how you can improve your page. The analysis is based on SEO fundamentals like making sure the focus keyword is in the page title, URL, heading, description, body content of

your article and image ALT tags. The plugin also analyses the readability of your content and gives you a [Flesch Reading Ease](#) score (English language only), measures outbound links, analyses subheadings and keyword density. All the things we know Google looks for when deciding how to rank a web page. This analysis is provided by [Linkdex](#).



The Page Analysis tab by Yoast and Linkdex

The plugin gives you granular control over meta robots, 301 redirects, canonical URLs and sitemap exclusions for every page and post and allows you to write custom paged descriptions for Facebook and Google+.

I also recommend you take the time to setup your clients domain in [Google's Webmaster Tools](#) and verify the sitemap using the XML Sitemaps page in the [WordPress SEO](#) plugin. It only takes a few moments and is essential for good SEO.

This is a truly outstanding plugin that is a must-have for any website. It's easy to use, powerful and your clients will love you for it. And it's free.

Read more about the plugin on [Joost's website](#) and brush up on your SEO skills with this [excellent beginners guide](#) by SEO Moz.

Finally, [this great article](#) from the New York Times website way back in 2006 explains why writing headlines for search engines is important. It's still as relevant today as ever.

Redirecting Traffic

A rookie mistake for inexperienced web developers is to redevelop a website for a client and pay no attention to any existing pages that may be attracting organic search traffic from Google. If your client has 30

pages attracting a few thousand visits a month from search engines you want to make sure you redirect that traffic to the new website once it goes live.

The best practice for redirecting traffic is to use a 301 permanent redirect which tells Google that a page has permanently moved to a new location. The [WordPress SEO](#) plugin allows you to setup 301 redirects for individual pages or setup a series of redirects in your .htaccess file.

The correct syntax for a 301 redirect in your .htaccess file is

```
redirect 301 /old/ /new/
```

For example, if I need to redirect traffic from an URL of

```
http://www.my-website.com/resources/uploads/article-103.html
```

to a new URL of

```
http://www.my-website.com/blog/post-name-103/
```

then the entry in my .htaccess file would look like this:

redirect 301 /resources/uploads/article-103.html http://www.my-website.com/blog/post-name-103/

Tip • Make sure any redirects are placed above the usual WordPress instructions in your .htaccess file.

Redirecting traffic can be tricky, but you can't just ignore it if your client's existing URL's are pulling in visitors. I suggest you read up on redirection over at [SEO Moz](#).

Page Headings = H1

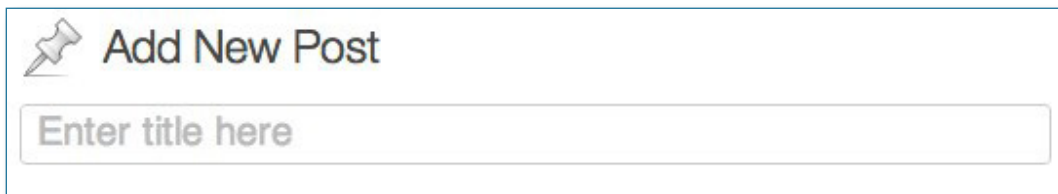
It's very common for WordPress themes to use the `<h1>` tag for the logo or name of the website in the header of the template. This is not good practice from an SEO point of view. Search engines want to know what each individual page is about. So if your website is titled "Video User Manuals" and a particular page is titled "SEO for WordPress Newbies" then you need the page heading to read "SEO for WordPress Newbies" not "Video User Manuals". Having the `<h1>` tag wrapped around the website name in the header will tell to Google that every page in your website is called "Video User Manuals" and that's the subject of your

entire website.

The best practice is to make sure your theme template files such as `single.php`, `page.php`, `home.php` etc., includes the following `<h1>` snippet:

```
<h1><?php the_title(); ?></h1>
```

This will ensure that whatever your client enters into the page or post title field in the WordPress dashboard will be read by Google as the first level heading on that page or post.

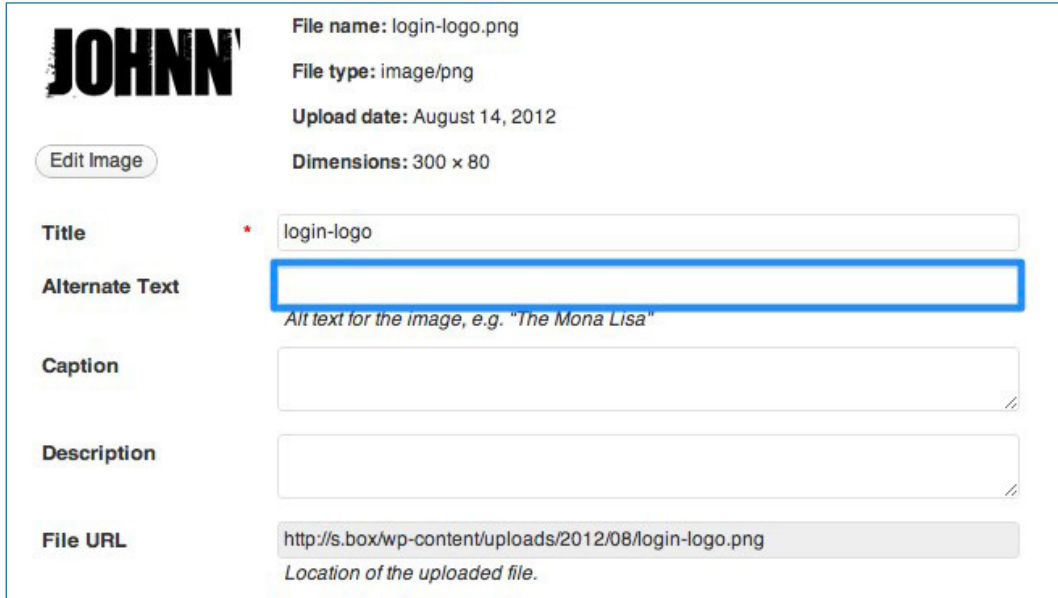


The page or post title field in the WordPress dashboard

Explain the ALT tag

Spend the 5 minutes it will take to explain to your client the importance of writing meaningful text in the ALT tag for all images they upload to their website.

Search engines read this text and a little bit of thought into the ALT text for an image can have a positive impact on search engine rankings.



The screenshot shows the WordPress media editor interface. On the left, there is a preview of the image, which is a logo with the word 'JOHNN' in a bold, black, sans-serif font. Below the preview is an 'Edit Image' button. To the right of the preview, the following information is displayed: 'File name: login-logo.png', 'File type: image/png', 'Upload date: August 14, 2012', and 'Dimensions: 300 x 80'. Below this information, there are several input fields: 'Title' (containing 'login-logo'), 'Alternate Text' (highlighted with a blue border), 'Caption', 'Description', and 'File URL' (containing 'http://s.box/wp-content/uploads/2012/08/login-logo.png'). The 'Alternate Text' field has a placeholder text: 'Alt text for the image, e.g. "The Mona Lisa"'. The 'File URL' field has a placeholder text: 'Location of the uploaded file.'

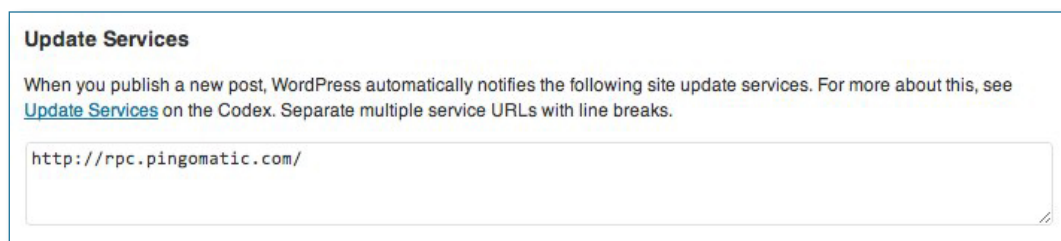
Editing the ALT text for an image in the WordPress dashboard

Ping Them An Update

A little known, but very powerful feature in WordPress is the Update Services feature. This feature sends out a XML-RPC ping to a bunch of blog aggregation services whenever a page or post is created or updated. This article on the [WordPress Codex](#) explains the benefits of this in greater detail. By default, WordPress pings just one service:

<http://rpc.pingomatic.com>

However, we've discovered a whole list of other services you should ping too. You can [download the entire list here](#) and just copy and paste it into the Update Services field in the WordPress dashboard under **Settings > Writing**



The update services option under Settings > Writing

Get Social

One of the quickest ways to get your clients new website indexed by Google is to get the domain name out into the social sphere. Adding social media buttons to the website is a breeze with the free [Digg Digg](#) plugin from the boys at [Buffer](#).

We have found in our experience that sharing a website on Google Plus

via the +1 button and submitting the home page URL to [Digg](#) can get a website indexed within hours, rather than days.

Your client will love you once they see their website appearing in Google search results.

The Need For Speed

In early 2010, Matt Cutts from Google announced that they were going to start counting [site speed as a signal in determining search rankings](#). Since then, web developers and publishers have been trying to optimise their websites for faster performance. We know it help search rankings, but it also provides a better user experience.

The solution? In a nutshell, the [W3 Total Cache](#) plugin from [Frederick Townes](#).

Now this plugin can get super complicated because it's super powerful. Some of it's features include caching pages and posts, minifying css and javascript, integration with Content Delivery Networks like Ama-

zon Cloudfront, Rackspace Cloud Files, MaxCDN and VPS Net, mobile device support and a whole swag of other goodies that make your site fast and scalable.

Thankfully, Dave Clements from [Do It With WordPress](#) has written an excellent [guide to getting started with W3 Total Cache](#) and if it all gets too hard, the plugin author will [install it and setup a basic configuration](#) for you for \$150 (at the time of writing).

Tip: Make sure you measure the performance of your site before and after installing the plugin using [Google's PageSpeed Tools](#).

This plugin is awesome. Don't be scared. Use it and wow your clients with high-octane performance.

The other caching plugin of note is [WP Super Cache](#) which is co-authored by Automattic themselves (the company behind WordPress). With over 3.5 million downloads and excellent reviews, it's worth using if you just want to cache static html versions of your pages to speed up your site's performance. You can pretty much install it and forget it.


Piecing It All Together

We recently identified a new keyphrase we wanted to rank for so we put this basic SEO strategy into place.

This is what we did:

- re-wrote the article to include the keywords we wanted to target
- optimised the image ALT tags
- made sure we linked to the post from the home page
- used the SEO plugin to write a special optimised title and meta description
- published the article so the all the update services were notified
- we then tweeted the article
- then we Dugg the article
- finally we submitted a video to YouTube, with optimised titles and keywords

These were the results with seven hours:




Search: ☒ the web ☐ pages from Australia

Web [+ Show options...](#)
Results 1 - 10

WordPress Instructions for clients — KnowIT
 24 Feb 2009 ... I've been rather busy lately putting together a **WordPress** and BBPress site for Zen at Heart. Because the site is heavily restricted I needed ...
knowit.co.nz/2009/02/wordpress-instructions-for-clients - [Cached](#)

Weblog Client « WordPress Codex
 You might think of Weblog **Clients** as the equivalent of email **clients** such as Outlook ...
 Microsoft Word 2007 · Post2Blog - detailed **WordPress instructions** ...
codex.wordpress.org/Weblog_Client - [Cached](#) - [Similar](#)

Simple wordpress instructions for clients/users
 Does anyone know somewhere that has simple instruction on how to post, edit posts, edit pages in **wordpress**. I'm looking for something to pass along to a ...
www.experts-exchange.com/Web.../WordPress/Q_24574596.html - [Cached](#)

Wordpress Instructions For Clients

 7 min - 7 hours ago
 videousermanuals.com This videos shows you the best way to customise **Wordpress** for your **clients**. It includes how to modify the dashboard, menu and ...
www.youtube.com/watch?v=nR78EOJgcxM - [Related videos](#)

9 Plugins Your Clients Will Love For Their WordPress Website ...
 The Yet Another Related Posts Plugin has suggested these Posts for you too: **WordPress Instructions for clients** A handy plugin ... Related Posts ...
regator.com/pl.../9_plugins_your_clients_will_love_for_their/ - [Cached](#)

Wordpress Instructions For Clients
 6 Mar 2010 ... We share with you the optimal installation of **Wordpress** to provide the clearest **instructions** for your **clients**.
digg.com/software/Wordpress_Instructions_For_Clients

Basic WordPress User Manual Needed - FreelanceSwitch Forum
 10 posts - 5 authors
 I have been building a fair number of sites in **WordPress** and my **clients** have never worked with it before. I wanted a guide that was super easy in language ...
forum.freelanceswitch.com/topic.php?id=8144 - [Cached](#)

WP Instructions Plugin | Sam Burdge
 19 Feb 2008 ... Comment by **WordPress Instructions for clients** | KnowIT. Date: February 24th, 2009 at 3:28 am. [...] that makes it possible to keep those ...
www.samburdge.co.uk/wordpress/wp-instructions-plugin - [Cached](#)

Wordpress Instructions For Clients | Wordpress Manual Plugin ...
 We share with you the optimal installation of **Wordpress** to provide the clearest **instructions** for your **clients**. Including a customised dashboard, menu, ...
www.videousermanuals.com/.../wordpress-instructions-for-clients/ - 7 hours ago

Wordpress Instructions For Clients - WordPress Slides and Videos
WordPress Instructions For Clients. Author: sliedevideo; Filed under: Videos. Thursday Apr 15, 2010. videousermanuals.com This videos shows you the best way ...
wpslide.com/wordpress-instructions-for-clients/ - 7 hours ago

Search engine results within seven hours

These were the results with 48 hours:

The screenshot shows a Google search interface with the query "wordpress instructions for clients". The search bar includes the Google logo, the text input, a "Search" button, and a link to "Advanced Search". Below the search bar, it indicates "Results 1 - 10 of about 319,000".

The first result is a sponsored link from WPDude.com titled "Need WordPress Help?".

The second result is from knowit.co.nz, titled "WordPress Instructions for clients — KnowIT", dated Feb 24, 2009. The snippet mentions putting together a WordPress and BBPress site for Zen at Heart.

The third result is from videousermanuals.com, titled "Wordpress Instructions For Clients | Wordpress Manual Plugin ...". The snippet describes providing optimal installation instructions for clients, including a dashboard and menu. A sub-link "Wordpress Manual Plugin - Video Tutorials For Your Clients" is highlighted with a red box. The snippet mentions over 30 high quality videos and a 100 page manual.

The fourth result is a video search section titled "Video results for wordpress instructions for clients". It contains two video thumbnails with titles and durations: "Wordpress Instructions For Clients" (7 min - Apr 14, 2010) and "Rebrand and Customise the WordPress Video user ..." (50 sec - Apr 8, 2010). Both are from www.youtube.com.

The fifth result is from codex.wordpress.org, titled "Weblog Client « WordPress Codex", dated Feb 24, 2009. The snippet mentions email clients like Outlook and Microsoft Word 2007.

The sixth result is from experts-exchange.com, titled "Simple wordpress instructions for clients/users", dated Feb 24, 2009. The snippet asks for simple instructions on how to post and edit posts.

The seventh result is from twitter.com, titled "Troy Dean (VUManuals) on Twitter", dated Feb 24, 2009. The snippet mentions a comprehensive video and online manual for WordPress users.

Search engine results within 48 hours

We hope our basic SEO guide helps you get great results for your clients.

CHAPTER V

Essential Plugins

So many plugins, so little time.

The world of free plugins is a wild ride. Many free plugins are free from support, free from awesome features, free from thorough testing and free from headaches. I suggest you only ever download free plugins from the official [WordPress Plugin Repository](#) and check to see how recently the plugin was updated, which version of WordPress it is compatible with and how well serviced the support forums are for the plugin.

If you find a plugin that works really well and does exactly what it promises, make sure you vote for it and rate it. It helps all of us choose more wisely.

The screenshot shows the Jetpack plugin page on WordPress.org. At the top, a grey banner contains the text "Supercharge your WordPress site with powerful features previously only available to WordPress.com users." and a red "Download Version 1.6.1" button. Below the banner is a navigation bar with links: "Description", "Installation", "FAQ", "Screenshots", "Changelog", "Stats", "Support", and "Developers". The "Support" link is circled in blue. The main content area on the left describes Jetpack as a WordPress plugin that supercharges self-hosted sites. It includes a link to "Jetpack.me" and a list of features, one of which is "Simple, concise stats with no additional load on your server. Previously provided by WordPress.com Stats." On the right side, a blue-bordered box contains technical details: "Requires: 3.2 or higher", "Compatible up to: 3.4.1", "Last Updated: 2012-8-4", "Downloads: 2,202,523", and an "Average Rating" of 4.5 stars (824 ratings).

Check out the versions, downloads, ratings and support of a plugin before you download it

My aim here is to make this as easy for you as possible. This is a list of all the plugins we use on every site we deploy.

Free Plugins

PLUGIN CENTRAL

This plugin allows you to install multiple plugins at once by simply entering the name or URL of the plugin download. We keep a text file on our intranet with a list of all our preferred plugins which we simply copy and paste in. Within 2 minutes, all of our plugins are installed. You can grab the [text file of our preferred plugins here](#). This plugin is also very

handy if you're moving domains or web hosts.

[Get it here.](#)

WORDPRESS SEO

I covered this plugin at length on [page 52](#). No more to be said. It's the bomb.

[Check it out here.](#)

W3 TOTAL CACHE

I spoke about this plugin on [page 61](#). Google loves fast performing web-sites. So do users.

[Check it out here.](#)

CMS TREE PAGE VIEW

This is a really handy plugin which provides a nice tree view of all the pages in a website, so your clients can easily understand the structure of their site. You can edit, search and drag-and-drop to reorder pages within the tree view giving your client a very intuitive way of managing their pages.

[Check it out here.](#)

WHITE LABEL CMS

I have covered this plugin in great detail already. We love it. You will too.

[Download it here.](#)

GOOGLE ANALYTICATOR

I covered this plugin on [page 28.](#)

[Check it out here.](#)

POST SNIPPETS

This very useful plugin lets you build a library with snippets of HTML, PHP code or recurring text that you can reuse in your posts and pages. You can also use the plugin to create your own shortcodes. This is excellent for maintaining the integrity of your design and still allowing the client full access to the WordPress WYSIWYG editor.

[Check it out here.](#)

ADVANCED CUSTOM FIELDS

If ever there was any doubt about WordPress as content management system, this plugin puts all those doubts to rest. Among it's many awesome features, it gives you complete control over the Edit screen for Pages and any type of Post, including custom post types. This means you can remove unnecessary fields form the Edit screen and only show what is necessary. This plugin was created by fellow Melbournian [Elliot Condon](#), so we're extra fond of it.

Check out the full list of features and documentation on the official [Ad-](#)

[vanced Custom Fields website](#) or [grab it here](#).

DUPLICATE POST

This plugin adds a “Clone” option directly below the title of each page or post in the “Edit Page” and “Edit Post” screen allowing you to duplicate an existing page or post with one click. The new clone is created as a draft ready for you to edit and publish. Very handy.

[Check it out here](#).

WORDPRESS FILE MONITOR PLUS

This plugin provides a little extra security by monitoring your WordPress installation for any added, deleted or changed files. When a change is detected an email alert can be sent to a specified address. Very useful.

[Get it here](#).

Premium Plugins

Yes we pay for plugins. They make our lives easier and add enormous value to our clients. Here are three premium plugins we install on every site without question.

BACKUP BUDDY

Backup your entire WordPress site, themes, widgets, plugins and database and send the backups to Dropbox, Amazon S3, Rackspace or deliver them via email to the client. Schedule regular backups via the cloud so you can sleep easy. If anything goes wrong you can easily restore a site with 30 minutes. Awesome for moving hosts or domains too.

[Get it here.](#)

GRAVITY FORMS

Gravity Forms is much more than a contact form plugin. It's a full featured form generator with an easy drag and drop interface, multi-page form support and conditional logic built in.

It's the only form plugin we use.

[Grab it here.](#)

WP VIDEO USER MANUAL

I think I've made a case for this plugin already, but just in case you missed it on [page 40](#), this plugin gives your clients over 35 video tutorials and a 100 page written manual right in their dashboard so they can learn how to use WordPress to manage the content on their site without bugging you.

[Get it here.](#)

That's all folks. Of course there are many other plugins we use from time to time to achieve different things, but these are the standards that ship with every website we build.

Happy Pressing of Words.

CHAPTER VI

Leveraging The User Manual

Just because there's more than one way to skin a cat, doesn't mean you should.

I admit, that quote has nothing to do with this chapter really. I just like it. It makes me laugh.

This chapter is designed for users of the WP Video User Manual plugin who are installing the plugin on multiple sites and will show you how to setup your **Master Profile** so you can install the plugin and have it re-branded and customised in 5 seconds. Of course you can still cus-

tomise every setting via the **Manual > Manual Options** page, however setting up your options in the **Master Profile** means you can set it up once and forget it.

[Check out the video walk-through of this process on our website here.](#)

The Master Profile

Once you ave installed the plugin and activated it for the first time, set it up the way you like it with your logos, titles and set which videos you'd like to show or hide.

Then, navigate to the “Set Master Profile” tab, tick the “Set as master profile?” box and click on save changes.

Video User Manuals Settings

Branding & Customization | Videos | Custom Videos | **Set Master Profile**

Language: Australian English
Which language / accent would you like?

Menu up top?: ☒ Yes ☐ No
The Menu item can go up under the dashboard rather than down the bottom

Custom Plugin Heading: Manual
Change the heading of the plugin from Manual to what you want.

Custom User Manual Heading: User Manual
Change the heading of the plugin from User Manual to what you want.

Custom Introduction Text: `<p>Hi, welcome to your new website! The following are some quick video tutorials which will help you get started. If you want to read the manual for some more in depth explanations on how your content management system works click here.</p>`
Change the introduction text for your clients if you want.

The "Set Master Profile" tab of the Video User Manuals plugin

Video User Manuals Settings

Branding & Customization | Videos | Custom Videos | **Set Master Profile**

If you would like to save these settings as your "Master Profile" so you can reuse them on other sites, tick the box and click save.

NB: This will overwrite your existing Master Profile, however it will not affect any sites you have previously setup with your Master Profile.

☒ Set as master profile?

Save Changes

[Reset the plugin](#) please note you will lose all your settings, but this will not effect your master profile.

Saving your Master Profile in the Video User Manuals plugin

Now that you have your master profile set, the next time you install the

plugin, simply enter your serial number and tick the “Apply my master profile” button and the plugin will automatically be setup just the way you like it.

Incidentally, we use this [photoshop thumbnail file](#) to produce the thumbnails so our videos look consistent with the videos that ship with the plugin.

Have fun!

Appendix

WordPress Deployment Checklist

This checklist comes straight from our intranet and is designed to help you deploy WordPress sites consistently.

Feel free to use it, modify and improve it as you wish.

Incidentally, we use and love [Basecamp](#) from [37 Signals](#) to manage our projects.

1. Create a new subdomain
2. Password protect the subdomain
3. Install WordPress on the subdomain
4. Create Editor user account

5. Upload our theme and activate the theme
6. Install [Plugin Central](#)
7. Install [preferred plugins](#) using plugin central. Activate each plugin
8. Change permalinks to read Post Name, Post Id/Post Name or Year/Post Name
9. Go to Settings->Miscellaneous and uncheck “Organize uploads by month”
10. Change title name in the SEO plugin
11. Go to White Label CMS
 - Re-brand with client logos
 - Add custom panel to dashboard with standard text.
 - Set CMS profile to website
 - Enable Menus for editors
12. Go to WordPress File Monitor Plus, enter email address for notifications and set **Admin Alert** to “No”

Disclaimer

Do your due diligence and take responsibility for your own business.

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The more end-users who have an awesome experience with WordPress, the more developers will be attracted to it as a CMS solution which will only serve to strengthen the WordPress ecosystem



TROY DEAN

Co-Founder of Video User Manuals

I sincerely hope this e-book helps you provide awesome websites to your clients and speeds up your development process. Most of the information contained in this publication was initially documented for our own internal purposes to help us systemise our business, deliver consistent results and free up some of our time.

In “The E-Myth Revisited”, Michael E Gerber talks about the importance of having systems that any unskilled person could follow in order to replicate a business. In response, Seth Godin wrote in “Linchpin: Are You Indispensable?”, that a business built on systems that cheap labor can follow will result in products without humanity and personal connection.

I think they are both right. WordPress is a toolbox full of systems that allow us to replicate websites fast. Keeping our focus on the client experience results in a personalised service where everybody wins.